Alberta Tourism Market Monitor

Calgary Air Traffic Numbers Soar in April

Calgary International Airport experienced a number of key increases in April. This includes an 8.3% increase in total arrivals and departures over April 2016 along with increases in domestic, transborder and international air travel at the airport (up by 5.7%, 15.0% and 13.3%, respectively). Edmonton International Airport's numbers were also up in April, with total arrivals and departures increasing by 12.4% over the same month last year.

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In Lethbridge, Red Deer and other Alberta communities, the hotel and lodging occupancy rate in April increased for the fourth consecutive month and is up 2.9 points over the same month last year. Despite this upward trend, the average daily room rate in Lethbridge, Red Deer and other Alberta communities slipped month over month this year, from January through April. The average daily room rate for April 2017 is also down 1.0% over the same month last year.

Employment for accommodation and food services also increased each month this year. This includes a 5.5% increase in May over the same month in 2016.

Summer Travel Intentions

While the province's economic recovery continues, Alberta residents remain upbeat about their prospects for travel compared to residents of other Canadian provinces. According to the Conference Board of Canada's latest Travel Intentions Survey, which was conducted this March, 77.3% of Alberta respondents indicated they were planning to take a trip of six or more nights between May 1 and October 31 of this year (the lowest number among provinces was Quebec at 70.4%). The share of Alberta respondents planning to travel within Canada is highest (about 50%), followed by going overseas (less than 20%) and the U.S. (about 10%) this summer.

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Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2017 (000's of arrivals and departures) [1]													
Edmonton International Total	569.1p	547.0p	605.4p	601.7p	**614.9p**								**2,950.3p**
Per cent change from 2016	1.2%	-1.3%	4.7%	12.4%	**3.9%**								**4.5%**
Domestic	423.9p	410.0p	459.4p	458.8p	**522.2p**								**2,286.3p**
Per cent change from 2016	6.0%	3.0%	7.7%	14.8%	**6.0%**								**8.0%**
Transborder	84.7p	83.4p	90.5p	87.1p	**64.6p**								**345.7p**
Per cent change from 2016	-12.7%	-12.4%	-5.2%	1.3%	**-8.5%**								**-7.4%**
International	60.5p	53.7p	55.6p	55.8p	**28.1p**								**225.6p**
Per cent change from 2016	-7.4%	-12.1%	-1.0%	12.3%	**-2.2%**								**-2.9%**
Calgary International Total	1,234.3r	1,192.3p	1,320.0p	**1,298.1p**									**5,045.3p**
Per cent change from 2016	2.2%	-0.1%	1.2%	**8.3%**									**2.9%**
Domestic	829.6r	796.5p	874.3p	**885.2p**									**3,386.2p**
Per cent change from 2016	2.0%	-1.9%	-2.2%	**5.7%**									**0.9%**
Transborder	237.9p	243.5p	279.9p	**255.6p**									**1,016.8p**
Per cent change from 2016	0.6%	2.7%	6.4%	**15.0%**									**6.1%**
International	166.9r	152.3p	165.8p	**157.3p**									**642.3p**
Per cent change from 2016	5.8%	5.0%	12.3%	**13.3%**									**9.0%**
Fort McMurray International Total	58.1p	54.9p	61.6p	63.0p									237.6p
Per cent change from 2016	-14.5%	-22.7%	-19.4%	-12.7%									-17.4%
Highway Count 2017 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7	57.7	65.2										180.6
Per cent change from 2016	1.1%	0.4%	-8.2%										-2.7%
Hwy 1 - Banff Pk Gate (2-way)	538.7	525.2	591.6										1655.5
Per cent change from 2016	-0.6%	-4.6%	-5.5%										-3.7%
Hwy 16 - Jasper Pk Gate (2-way)	89.8	87.7	110.3										287.8
Per cent change from 2016	-0.3%	-1.5%	-7.2%										-3.4%
Hwy 16 - Blackfoot w-bound	143.9	141.8	160.4										446.1
Per cent change from 2016	0.0%	1.9%	0.1%										0.6%
National Park Attendance (000's of visitors) 2017 [3] **Does not include Group Tours**													
Banff	201.7	201.6	228.4	267.8									899.5
Per cent change from 2016	2.6%	-5.0%	-4.5%	10.4%									1.0%
Jasper	51.2	52.0	64.9	151.1									319.2
Per cent change from 2016	0.3%	-5.8%	-9.4%	7.7%									0.3%
Waterton Lakes	9.2	9.6	12.7	20.4	**56.3**								**108.2**
Per cent change from 2016	8.7%	-16.9%	-3.3%	4.1%	**34.4%**								**14.4%**
Elk Island	17.9	18.8	22.6	26.3									85.6
Per cent change from 2016	29.6%	16.4%	16.5%	-5.7%									10.7%
Wood Buffalo	0.02	0.01	0.01										0.05
Per cent change from 2016	214.3%	-72.2%	-39.1%										-34.3%
Employment (000's of persons) 2017 Seasonally Adjusted [4]													
Accommodation and Food Services	143.8p	144.9p	146.4p	147.5p	**149.2p**								**146.4p**
Per cent change from 2016	4.4%	6.5%	5.6%	5.8%	**5.5%**								**5.3%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, and Statistics Canada.

Accommodation Indices for Major Regions 2017[3]													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	46.8%	56.7%	62.0%	**59.6%**									**56.3%**
Point change from 2016	-3.1	-1.7	0.8	**-1.0**									**-1.0**
Average Daily Room Rate	$128.56	$133.48	$133.13	**$132.44**									**$132.09**
Variance from 2016	-1.0%	0.1%	0.3%	**0.7%**									**0.2%**
Revenue per available room	$60.13	$75.67	$82.48	**$78.87**									**$74.37**
Calgary Occupancy Rate	42.5%	50.8%	53.0%	**56.1%**									**50.5%**
Point change from 2016	-3.1	0.5	-0.4	**-0.3**									**-0.9**
Average Daily Room Rate	$134.61	$138.79	$138.10	**$139.35**									**$137.67**
Variance from 2016	-4.7%	-1.5%	-1.2%	**-3.3%**									**-2.6%**
Revenue per available room	$57.15	$70.45	$73.26	**$78.16**									**$69.54**
Alberta Resorts Occupancy Rate	42.9%	53.2%	56.4%	**53.7%**									**52.0%**
Point change from 2016	0.2	-1.0	0.7	**6.2**									**1.7**
Average Daily Room Rate	$195.37	$206.57	$198.74	**$190.13**									**$196.01**
Variance from 2016	6.8%	6.5%	2.4%	**7.0%**									**5.2%**
Revenue per available room	$83.72	$109.80	$112.13	**$102.18**									**$101.87**
Other Alberta* Occupancy Rate	37.4%	42.0%	46.0%	**42.1%**									**42.1%**
Point change from 2016	2.2	2.7	6.1	**2.9**									**3.6**
Average Daily Room Rate	$115.85	$115.98	$115.99	**$116.30**									**$116.58**
Variance from 2016	-5.2%	-6.0%	-3.8%	**-1.0%**									**-4.0%**
Revenue per available room	$43.33	$48.72	$53.38	**$48.93**									**$49.12**
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	48.9%	52.8%	**51.1%**									**48.5%**
Point change from 2016	-0.8	1.0	3.0	**1.2**									**1.2**
Average Daily Room Rate	$125.81	$129.01	$128.57	**$129.04**									**$128.08**
Variance from 2016	-3.9%	-2.4%	-1.7%	**-1.3%**									**-2.3%**
Revenue per available room	$52.33	$63.03	$67.83	**$65.93**									**$62.17**

Accommodation Indices for Selected Cities or Towns 2017[3]													
Occ%= Occupancy Rate **ADR**= Average Daily Room Rate **RevPar**= Revenue Per Available Room	April			Year-To-Date				April			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	**36.1%**	**$94.52**	**$34.17**	**32.9%**	**$95.31**	**$31.33**	Banff	**64.2%**	**$176.03**	**$113.08**	**64.6%**	**$176.29**	**$113.82**
Bonnyville	**28.1%**	**$104.77**	**$29.49**	**29.4%**	**$106.39**	**$31.25**	Canmore	**53.6%**	**$126.92**	**$68.08**	**45.3%**	**$119.43**	**$54.10**
Drayton Valley	**25.5%**	**$108.28**	**$27.64**	**45.3%**	**$109.62**	**$49.71**	Drumheller	**28.0%**	**$120.50**	**$33.71**	**23.8%**	**$120.39**	**$28.67**
Edson	**38.3%**	**$111.90**	**$42.84**	**60.5%**	**$111.81**	**$67.65**	Fort Mac	**57.6%**	**$147.82**	**$85.13**	**49.2%**	**$145.71**	**$71.72**
Fort Saskatchewan	**31.6%**	**$111.15**	**$35.14**	**28.0%**	**$111.26**	**$31.14**	Gr. Prairie	**55.6%**	**$125.22**	**$69.58**	**56.2%**	**$124.51**	**$69.92**
High Level	**29.9%**	**$122.57**	**$36.70**	**40.3%**	**$123.64**	**$49.77**	Hinton	**39.7%**	**$100.27**	**$39.78**	**37.5%**	**$97.46**	**$36.57**
Innisfail	**25.4%**	**$75.28**	**$19.15**	**24.8%**	**$78.43**	**$19.42**	Jasper	**61.1%**	**$167.10**	**$102.79**	**50.9%**	**$162.99**	**$82.99**
Leduc	**48.2%**	**$99.07**	**$47.76**	**47.3%**	**$100.23**	**$47.48**	Lethbridge	**57.1%**	**$111.43**	**$63.57**	**47.6%**	**$108.28**	**$51.57**
Lloydminster	**46.9%**	**$113.02**	**$53.01**	**40.2%**	**$113.33**	**$45.52**	Med. Hat	**51.7%**	**$107.86**	**$55.71**	**46.3%**	**$109.46**	**$50.73**
Nisku	**57.4%**	**$98.33**	**$56.49**	**57.4%**	**$98.11**	**$56.34**	Red Deer	**41.0%**	**$103.15**	**$42.27**	**37.2%**	**$103.69**	**$38.59**
Sherwood Park	**44.9%**	**$128.29**	**$57.60**	**38.1%**	**$126.37**	**$48.10**	Whitecourt	**23.4%**	**$114.32**	**$26.76**	**45.3%**	**$111.76**	**$50.64**
Total Alberta	**51.8%**	**$136.35**	**$70.60**	**49.5%**	**$135.94**	**$67.30**							

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2017 ($ Millions) unadjusted[7]													
Total Receipts for Alberta	**690.96r**	**675.48r**	**752.89p**										**706.44p**
Per cent change from 2016	**0.3%**	**-2.0%**	**1.6%**										**0.0%**
Historic Sites and Museums 2017 (000's of visitors)[8]													
Visitor Attendance**	10.5p	**25.3p**	27.5p	36.9p	**76.03p**								**176.2p**
Per cent change from 2016	-0.9%	**2.9%**	-24.2%	10.8%	**4.9%*** **								**-1.6%**
Exchange Rates 2017[9]													
Canadian Dollar/U.S. Dollar (noon)	0.76	0.76	0.75	0.74	**0.73**								**0.75**
Canadian Dollar/ Euro	0.71	0.72	0.70	0.69	**0.67**								**0.70**
Canadian Dollar/ Great British Pounds	0.61	0.61	0.61	0.59	**0.57**								**0.60**
Oil Price: Western Texas Intermediate (WTI) 2017[10]													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	53.47	49.33	51.06	**48.48**								**50.97**
Major Tourism Projects Valued $5 million or Greater 2017 ($ Millions)[11]													
Total Value of Hotel Projects Inventory	$666	$499	$449	**$450**									**$450**
Sources: Statistics Canada, Alberta Culture and Tourism, Bank of Canada, WTI, Government of Alberta.													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

**Please note some of the historical sites have changed their hours of operation - see Notes section for details.

***Oil Sands Discovery Centre was excluded because of wild fire in Fort McMurray last year.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year to date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 15 historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture and Tourism

9. Exchange Rate - this is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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